



## **TERMS OF REFERENCE** **FOR INDIVIDUAL CONTRACT**

<b>POST TITLE:</b>	Partnerships and Resources Mobilization Consultant
<b>AGENCY/PROJECT NAME:</b>	UN Capital Development Fund/SHIFT Program
<b>TYPE OF CONTRACT</b>	Individual Consultant
<b>DUTY STATION:</b>	Home-based with possible travel required
<b>DURATION:</b>	1 July to 31 December 2020

### **1) GENERAL BACKGROUND**

#### **About UNCDF**

The United Nations Capital Development Fund (UNCDF) makes public and private finance work for the poor in the world's 47 least developed countries. With its capital mandate and instruments, UNCDF offers "last mile" finance models that unlock public and private resources, especially at the domestic level, to reduce poverty and support local economic development. UNCDF's financing models work through two channels: financial inclusion that expands the opportunities for individuals, households and small businesses to participate in the local economy, providing them with the tools they need to climb out of poverty and manage their financial lives; and by showing how localized investments — through fiscal decentralization, innovative municipal finance and structured project finance — can drive public and private funding that underpins local economic expansion and sustainable development. By strengthening how finance works for poor people at the household, small enterprise and local infrastructure levels, UNCDF contributes to the Sustainable Development Goals (SDGs), particularly Goal 1 on eradicating poverty and Goal 17 on the means of implementation. UNCDF also contributes to other SDGs by identifying those market segments where innovative financing models can have transformational impact in helping to reach the last mile and address exclusion and inequalities of access. To achieve these goals, UNCDF is providing financial support and technical expertise to the public and the private sector. It provides capital financing – in the form of grants, soft loans and credit enhancement products – and the technical expertise to unleash sustainable financing at the local level.

#### **About SHIFT ASEAN and SAARC**

UNCDF's 'Shaping Inclusive Financial Transformations' (SHIFT) program aims to catalyze access to formal financial services to advance women's economic empowerment and gendered financial inclusion for millions of women and small businesses in the ASEAN and SAARC markets. SHIFT leverages product and business model innovations, data analytics, technical training, and policy advocacy services at different levels to change the behavior of market players. Data and research crosscuts into all SHIFT's activities as the shaping of inclusive financial transformations cannot be accomplished without the use of good data and research to inform and facilitate markets and address the gender research gap. SHIFT advocates evidence-based financial inclusion policies and practices that expand access and usage of financial services for women by facilitating, informing and incentivizing FSPs, regulators and governments and by stimulating collective dialogue between them.

The programs works through four interrelated outputs: The **Data and Analysis Hub** produces and disseminates knowledge on supply, demand and regulation in financial markets to strengthen the evidence base and investment decisions of providers, regulators and policy makers to advance women's financial inclusion. This is closely integrated with the **Learning and Skills Development facility** that capacitates technical service providers to scale viable learning and training models for financial institutions. The **Policy and Advocacy component** stimulates dialogue among policy makers in FSPs and governments to enable financial market policies to be more responsive

to the needs of women. Finally, the **Innovation Facility** offers various types of incentives to FSPs to pilot new prototypes and scale viable innovative (digital) finance business models to advance access to and usage of finance for women.

- ✓ **SHIFT ASEAN** has been established in 2014 with initial funding from the Australian Government and focuses on ASEAN's frontier economies of Cambodia, Lao PDR, Myanmar and Viet Nam (CLMV).
- ✓ **SHIFT SAARC** has been established in mid-2016 with initial funding from the Bill and Melinda Gates Foundation and the European Union. SHIFT SAARC pilot in Bangladesh aims for Digital Finance Services to become widely recognized by regulators and providers as enabler of financial inclusion and thereby increasing its use among the adult population from 9% to 30% by 2019.

## About Digital@UNCDF

UNCDF Financial Inclusion Practice Area is focusing on Digital Financial Services and how they can improve financial inclusion for the vulnerable groups. For this reason, all the ongoing projects will focus more and more on promoting DFS as the main tool to promote financial inclusion.

## 2) OBJECTIVE OF AGREEMENT

### Partnerships and Programme Expansion Consultant

UNCDF Financial Inclusion Practice Area continues to expand its range of partnerships, programmes, donors and networks. In South Asia and South-east Asia, there are several programmes being presently implemented at regional and country level. The learnings gained and opportunities identified, need to be tapped into for developing new programmes/projects and expanding existing successful interventions/projects. The Consultant will support in capturing the learnings of existing work of FIPA in the region, map the existing partnership ecosystem in the emerging digital economy transformations, work on developing concepts, and overall mobilise technical and financial partnerships. This role includes building on SHIFT's existing work streams in the region and undertaking ideation and concept development for future work stream proposals particularly around digital innovation and digital financial services.

## 3) SCOPE OF WORK

Considering the objectives, the consultants will focus on the following Scope of Work (SOW):

1. Assessment of development and impact partner priorities;
2. Technical and financial resource mobilization;

KEY SOW	Final products
<b>1. Assessment of development and impact partner priorities</b>	<ul style="list-style-type: none"> <li>• At least one Regional partnership document developed on Inclusive Digital Economy</li> </ul>
<b>2. Technical and Financial Resource Mobilization</b>	<ul style="list-style-type: none"> <li>• At least one summary findings paper on Financial &amp; Digital Inclusion among Minority Segments</li> <li>• At least one proposal on Financial Inclusion &amp; Climate Resilience</li> </ul>

#### 4) DURATION OF ASSIGNMENT, DUTY STATION AND EXPECTED PLACES OF TRAVEL AND TYPE OF CONTRACT

**Contract duration:** 1 July to 31 December 2020

**Number of working days:** 55 working days

**Duty station:** Home-based with possible travel to countries where SHIFT operates; Bangladesh, Cambodia, Indonesia, Lao PDR, Myanmar, Vietnam, among others. The schedule of travel will be negotiated with the consultant according to the requirements of each programme.

**Travel:** Travel costs associated to the assignment will be paid as reimbursable basis and following the UNDP/UNCDF rules and regulations which states that consultants shall only be paid the most direct and most economical ticket, as will be quoted by the official UN travel agency. Any amount in excess of the said quotation, such as class and airline preference of the consultant, shall be borne by the consultant and the daily living allowance will be paid as per UN Rate.

#### 5) FINAL PRODUCTS

The final products will be:

Deliverable	Payment Percentage	Due Date
1. Assessment of development and impact partner priorities <ul style="list-style-type: none"><li>At least one Regional partnership document developed on Inclusive Digital Economy</li></ul>	30%	July 2020
2. Technical and Financial Resource Mobilization <ul style="list-style-type: none"><li>At least one summary findings paper on Financial &amp; Digital Inclusion among Minority Segments</li><li>At least one proposal on Financial Inclusion &amp; Climate Resilience</li></ul>	40%	September 2020
	30%	December 2020
	100%	

*"The sequence and timelines for the delivery of the above outputs may vary within the duration of the contract".*

#### 6) PROVISION OF MONITORING AND PROGRESS CONTROLS

The consultant will work under direct supervision of SHIFT ASEAN/SAARC Programme Manager and/or his designate, and in close collaboration with in-country teams. The consultant is responsible for providing his/her own laptop.

Payment to an Individual Contractor will be made based on the agreed percentage and upon certification of satisfactory performance, and acceptance of the output by the SHIFT ASEAN/SAARC and any other project Programme Manager and/or his designate.

The following supporting documents will serve as conditions for disbursement: (i) submission of an invoice and Certificate of Payment (COP); (ii) review, approval and written acceptance of each deliverable by the SHIFT ASEAN/SAARC and any other project Programme Manager and/or his designate; (iii) submission of a time-sheet and expenses with relevant supporting documentation; and (iv) an authorization of payment disbursement from a direct supervisor.

## 7) DEGREE OF EXPERTISE AND QUALIFICATIONS

### Education

- She/he will have minimum Bachelors' in Development, Business, Gender studies, Finance, Economics, International Relations, Social Science or similar studies.

### Experience

- Minimum 5 years of experience in resource mobilisation and partnership development.
- A strong track record of proposal and partnership development.
- Understanding of the financial and digital inclusion ecosystem in Indonesia / Asia Pacific.
- Familiarity with the development of proposals for the Green Climate Fund is a strong asset.
- Experience collaborating with or working with Disabled Persons Organisations (DPOs) and Persons with Disabilities (PwDs) is preferred.
- Expertise in financial inclusion or market development programmes is preferred.
- Ideal candidates would be familiar with or have experience working with UNCDF.
- Good interpersonal skills and experience in working effectively in a multi-cultural environment, with sensitivity to diverse opinion.
- It is preferred if the candidates technical and financial resource mobilisation experience is clearly stated in the application indicating the amount of funds raised and partnerships developed.

### Language:

- Fluency in written and spoken English

### Desired attributes:

#### Corporate Competencies:

- Demonstrates integrity by modeling the UN values and ethical standards and acts in accordance with the Standards of Conduct for International Civil Servants.
- Promotes the vision, mission and strategic goals of the UN Capital Development Fund.
- Displays cultural, gender, region, race, nationality and age sensitivity and adaptability.
- Treats all people fairly without favoritism.
- Demonstrates results-oriented and "can-do" attitude.

#### Functional Competencies:

- Result Orientation: results driven, problem-solver with structuring and analytical capabilities, anticipates constraints in the delivery of services & identifies solutions & alternatives; demonstrates openness to change & ability to manage complexities and resolve problems; focus on impact and results; approaches work with energy and positive attitude, responds positively to constructive feedback.
- Strategic Thinker: strong ability to think and act strategically, even in situation of ambiguity to develop both short-terms and long-term strategies.
- Communication: Strong verbal and oral communicator serving multiple functions and audiences as needed, strong analytical and writing skills and ability to communicate effectively to different audiences.
- Interpersonal skills: strong ability to work in a multi-cultural environment and with diverse stakeholders (governments, donors, financial services providers) with sensitivity to diversity of opinions.

## 8) APPLICATION PROCESS

Interested individuals must submit the following as proposals in order to demonstrate their qualifications: (NOTE: THE SYSTEM DOES NOT ALLOW MULTIPLE UPLOADS OF DOCUMENTS THEREFORE APPLICANTS MUST MAKE SURE TO UPLOAD ALL REQUIRED DOCUMENTS IN ONE FILE). Proposers who shall not submit below mentioned documents will not be considered for further evaluation.

When applying for this consultancy position, please apply with your official name as shown in the government issued identification document (e.g. passport and/or driver license). Contract award is subject to this verification.

- CV or P11, indicating all past experiences from similar projects, as well as the contact details (email, telephone, skype) of the Candidate with at least three (3) professional references. Link to P11: [http://sas.undp.org/documents/P11\\_Personal\\_history\\_form.doc](http://sas.undp.org/documents/P11_Personal_history_form.doc)
- A cover letter responding to competency criteria indicating why the candidate considers himself/herself suitable for the required consultancy as well as stating earliest availability. Please paste this letter into the "Resume and Motivation" section of the electronic application.
- Confirmation of interest and Financial proposal.
- One (1) sample or detailed summary of similar works – that you consider to be the best and most relevant example to this ToR.

Individual Consultants are responsible for ensuring they have vaccinations/inoculations when traveling to certain countries, as designated by the UN Medical Director. Consultants are also required to comply with the UN security directives set forth under [dss.un.org](http://dss.un.org).

Both individual consultants and individuals employed by a company or institution are welcome to apply. Any individual employed by a company or institution who would like to submit an offer in response to a Procurement Notice for IC must do so in their individual capacity (providing a CV so that their qualifications may be judged accordingly).

Women candidates or women-owned businesses are strongly encouraged to apply. UNCDF is committed to achieving workforce diversity in terms of gender, nationality and culture. Individuals from minority groups, indigenous groups and persons with disabilities are equally encouraged to apply. All applications will be treated with the strictest confidence.

UNDP's Individual Consultant's General Terms and Conditions are provided here:

<http://www.undp.org/content/dam/undp/documents/procurement/documents/IC%20-%20General%20Conditions.pdf>

## 9) EVALUATION CRITERIA

Applications will be rated on both technical and financial submissions. The following selection method will be used: Highest rated proposal using the combined scoring method, which assigns the weight distribution between the technical and financial proposals. The overall combined score will be 100 points, where weight distribution shall be 70% technical and 30% financial.

### Step I: Screening

Applications will be screened and only applicants meeting the following minimum criteria will progress to the pool for shortlisting:

Education:

- She/he will have minimum Bachelors' in Development, Business, Gender studies, Finance, Economics, International Relations, Social Science or similar studies.

Experience:

- Minimum 5 years of experience in resource mobilisation and partnership development.

## Step II: Shortlisting by Desk Review: (70 Points)

UNCDF will conduct a desk review to produce a shortlist of candidates and technically evaluate candidates as follows:

Criteria	Maximum Points Attainable
<ul style="list-style-type: none"><li>• She/he will have minimum Bachelors' in Development, Business, Gender studies, Finance, Economics, International Relations, Social Science or similar studies.</li></ul>	10
<ul style="list-style-type: none"><li>• Minimum 5 years of experience in resource mobilisation and partnership development.</li></ul>	30
<ul style="list-style-type: none"><li>• Understanding of the financial and digital inclusion ecosystem in Indonesia / Asia Pacific.</li></ul>	20
<ul style="list-style-type: none"><li>• A strong track record of proposal and partnership development.</li></ul>	10

## Step III: Financial Evaluation (30 Points)

The following formula will be used to evaluate financial proposal:

Lowest priced proposal/price of the proposal being evaluated x 30%.

## Step IV: Contract Award

The top candidate(s) that achieved the highest cumulative score will be recommended for a contract award.

UNCDF reserves the right to increase or decrease this number depending on the quality of the applications that will be received.

## 10) CONSULTANT PRESENCE REQUIRED ON DUTY STATION/UNDP PREMISES

☒ NONE      ☐ PARTIAL      ☐ INTERMITTENT      ☐ FULL-TIME